Electronic Proposal Development and Submission

Module 3

Professional Profiles

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Cayuse 424
Electronic Proposal Development and Submission
In this module you will learn:

- What a professional profile is
- How to create a professional profile
- How to find an existing professional profile
- How to add biosketches to a profile
- How to assign permissions to a profile
- How to avoid duplicate profiles
Professional profiles capture and store data about Principal Investigators, Key Personnel, Other Significant Contributors, AORs, Signing Officials, and other important personnel.

Before you create a proposal, locate or create professional profiles for the personnel who will be named in the proposal.
Information stored in a person’s professional profile is autofilled into a proposal when the person is selected as a:

- PI/PD
- Senior/Key Person
- Authorized Representative (AOR)
- Administrative Contact
- Payee

Professional profiles stored in Cayuse 424 can be shared with others and re-used for each proposal.
1. Create a professional profile.
2. Associate the profile with an institution.
3. Complete the profile fields.
4. Attach available biosketches.
5. Add appropriate users to the profile’s permissions area.
6. Link the person’s user account to the professional profile.
Finding a Professional Profile

1. Click the **People** tab
2. Enter the person’s first or last name in the search box.
3. Click **Search**.

If you find a profile for the person, you will not need to create one.
1. Sign in to Cayuse 424 and click the **People** tab.

2. Click the Add Person button: +Person
3. Enter the person’s name.
4. Click **Create New Profile**.

5. The profile will be created with fields for basic biographical information:
Once the profile is created, it must be affiliated with an institutional association. The institutional association holds:

- Position title and department
- Contact information
- eRA Role

*Professional Profiles should only be created for UCSB personnel. (For more information on adding senior/key personnel from outside UCSB, see module 6)
1. Click the add button next to Institutional Associations in the professional profile:
2. Select the institution using the drop-down menu.
3. Click **Create Institutional Association**.
Completing the Professional Profile

Click each section to enter the relevant information.

- Name
- Degrees
- Demographics
- Contact Info
- eRA Role
- Dept / Division / Title
- Performance Site
Selecting an eRA role means the person’s profile will appear when searching for people to add to the proposal in that role.
**eRA Role**

- **Principal Investigator:** Displays person as an option when selecting a PI.

- **Administrative Official:** Displays person as an option when selecting the “Person to be contacted on matters involving this application”.

- **Signing Official / “AOR”:** Displays person as an option when selecting the Authorized Representative.

- **Assistant:** Does not affect autofill inclusion.

- **Payee:** Displays person as an option when selecting a Payee for Environmental Protection Agency (EPA) proposals.
1. Click ➕ next to Biosketches.

![Biosketches +](image)

Currently no Biosketches are filed in Cayuse424 for "Adams, John Quincy".

2. Enter a name for the biosketch and click Next.

![Enter a name for the new biographical sketch.](image)
3. Click **Browse** to locate the PDF version of the biosketch.

4. Click **Next**.

5. Click **Browse** again to attach source (e.g. Word) version of the biosketch. (optional)

6. Click **Done**.
Multiple biosketches can be created and stored in each professional profile.

Once biosketches are attached to the professional profile, they can easily be included on the Senior/Key Persons form of the proposal.
Once a professional profile has been created, permissions can be assigned.

The creator of a professional profile is automatically granted all permissions associated with that profile.

The profile creator can share the profile with other users by granting appropriate permissions.

Permissions can be changed or removed as needed.
1. To grant profile permissions to other users, click the permissions key in the upper right:

2. Click **Add user**.
3. Select a user from the list, or search by **first name**, **last name** or **username**.

4. Click the username in your search results. The user will be added to the permissions.

5. Click **Close**.
After adding the user to the permissions, select the permissions they should have.

- The default permissions are List, Read, and Autofill.
- Permissions are mostly independent, so if you want someone to be able to edit the profile, be sure to assign Read as well.
<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List</td>
<td>Can see the profile in lists, but cannot view or modify the details of the profile.</td>
</tr>
<tr>
<td>Read</td>
<td>Can view the details of the profile.</td>
</tr>
<tr>
<td>Write</td>
<td>Can modify all data within the profile.</td>
</tr>
<tr>
<td>Autofill</td>
<td>Can autofill the professional profile into a proposal.</td>
</tr>
<tr>
<td>Delete</td>
<td>Can delete the professional profile.</td>
</tr>
<tr>
<td>Change Permissions</td>
<td>Can change security permissions for the professional profile.</td>
</tr>
<tr>
<td>Add/Remove User</td>
<td>Can add or remove other users from the profile permissions.</td>
</tr>
</tbody>
</table>
To prevent confusion, each person should have only one professional profile in the system.

To avoid duplicate profile creation, you see a list of matching names and are asked to verify before creating a new profile.

*Duplicate profiles should not be created. If you need to add a PI who has multiple appointments, you should autofill the current profile, and then make any necessary changes within your proposal.

Profile Name Conflict

The name 'John Heldens' may match the existing profile below:

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Heldens</td>
<td>University of Cayuse</td>
<td>Neurology</td>
</tr>
</tbody>
</table>

If you need access to a profile, please contact the department admin.

Create Anyway  Cancel
Now that the profile has been created, the person’s user account should be linked to the profile.

1. Click the **Settings** tab

2. Click **Link this User to a Professional Profile**?

3. Select the new professional profile from the list.

4. The user is now linked and can participate in routing and easily find their own profile.
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